How to Create the SW Region's ePlan Review Workflow

Using Bluebeam

These instructions are for the design team (Project Managers and Project Leaders) to use to initiate and prepare their projects for regional plan reviews. A separate set of instructions for the reviewers of the project files to use is located here.

This workflow contains five distinct phases (all contained within this document):

1. Phase 1 – Creating the folder to house the review files and converting all review documents to PDF format. *(updated)*
2. Phase 2 – Creating the review session in Bluebeam.
3. Phase 3 – Creating a notification email containing a link to the Bluebeam session developed in Phase 2 (using **Outlook** application). *(updated)*
4. Phase 4 – Compiling and responding to review comments.
5. Phase 5 – Finalizing the review session.

Note: This workflow shows the files for the Pre-PS&E plan review, but it can be used for the Final Scope Certification (30%) and Design Study (60%) plan reviews as well. The workflows are identical for all three milestones.

Files to be included at each review milestone (at a minimum):

- Final Scope Certification (formerly Preliminary Impact and 30%) Review: Include preliminary plan and *estimate
- Design Study (formerly 60%) Review: Include preliminary plan and *estimate
- Pre-PS&E Review: Include plan, *estimate, special provisions, and PS&E documents

*Do not include in Bluebeam Session. Should be added as a confidential document not visible to external reviewers. Process for added as a confidential document is described in Phase 3 of the workflow.

Note: Refer to the schedule in PMP to see approximately when each of these review milestones should be conducted.

Phase 1: Creating the folder to house the review files and converting all review documents to PDF format.

Create a new folder called **"eplan_review"** in your Box project folder for the appropriate review phase in the location shown.

Box\DTSD-Projects-Public*Project_ID*\MilestoneReview\....

Note: In order for this process to work, all file and folder names must be compliant with file naming standards. In general, only letters and numbers are allowed (underscores and dashes are also allowed). If there are special characters such as ", ! @" etc., the process will fail. Making all names compliant before starting this process is advantageous.

All project documents to be reviewed must be in PDF format. To convert the files to PDF file format, right click on the file in the Windows Explorer dialog box and select "Convert to Adobe PDF" as shown in Figure 1. Or open the file and save as PDF.

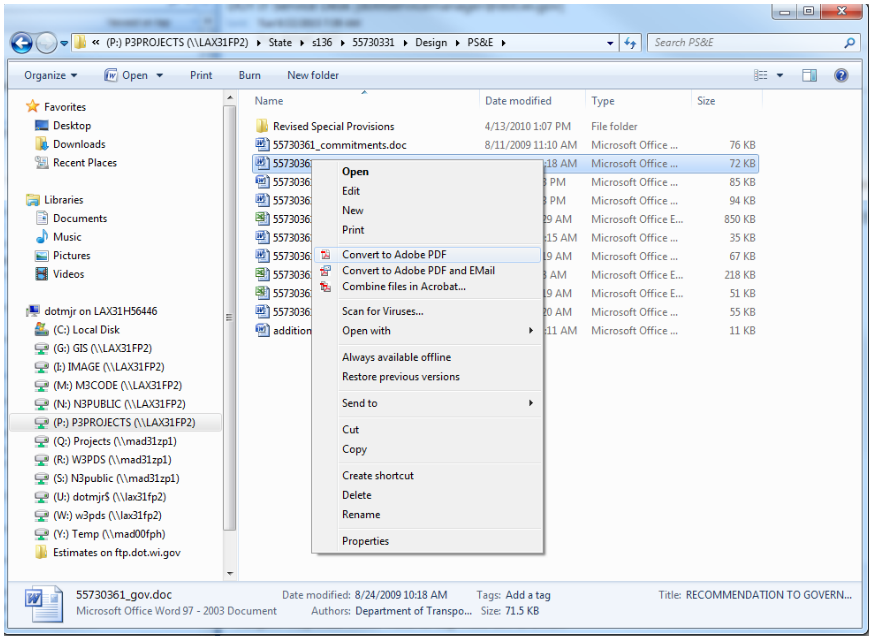

Figure 1: Converting files to PDF's.

Save the pdf's to the newly created **"eplan_review"** folder location. Include a copy of the plan in this location as well.

This concludes Phase 1.

Phase 2: Creating the review session in Bluebeam.

A review session needs to be created in Bluebeam to request review of the files saved in Phase 1. Follow the instructions included in the Creating Bluebeam Review Session training video for additional guidance. This training video, along with many other helpful videos, is located on the Bluebeam - Design Review Implementation SharePoint site.

> *Note: Before a review session can be created, a Bluebeam Studio account needs to be created. For guidance on that, view the* How to Sign up for a Bluebeam Studio Account training video *or refer to the pdf on* How to Sign up for a Bluebeam Studio Account.

The first step in the process is to open Bluebeam. Next, select the "Studio" (House) icon (1) and then click on "Sessions" (2). Then click the "+" button (3) and select "New Session" (4) from the drop-down menu (Figure 2).

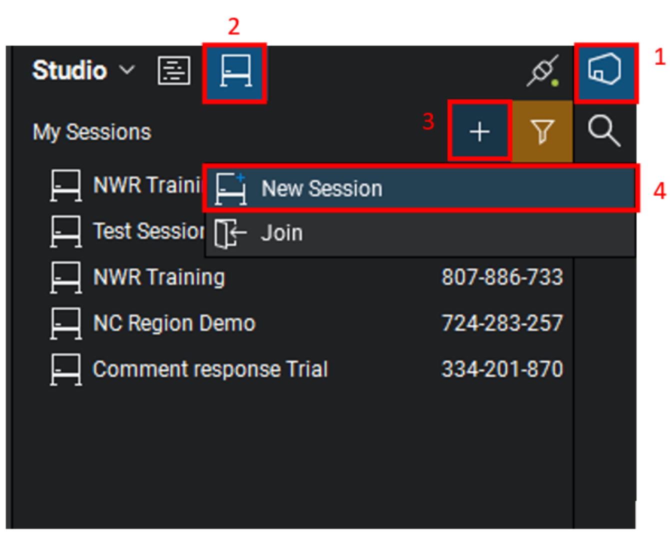

Figure 2: Creating New Review Session.

The "Start Studio Session" window will appear (Figure 3). Proceed addressing the following:

- A name will need to be given to the review session. Use the naming convention, "*Construction ID_review phase*" (i.e. 5163-07-72_60% or 5571-00-81_Pre-PS&E).
- To ensure that all intended reviewers can access the session and review the files, make sure to **uncheck the "Restrict Attendees by Email Address" box**.
- A session expiration date can be selected, which will act as your review deadline date (optional).
- Click "Add" to select the files to be included in the review session.

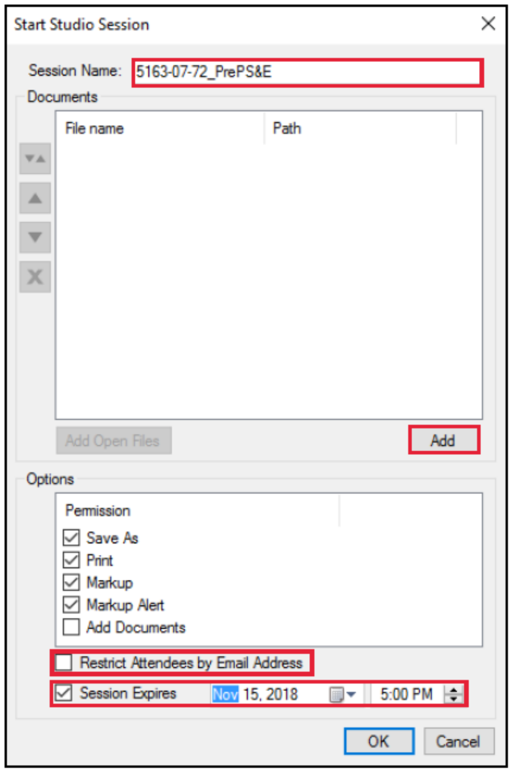

Figure 3: Start Studio Session.

Select the pdf files to be included in the review session and click "Open" to add the files (Figure 4). Multiple files can be selected at the same time using the Crtl or Shift key. Reminder to not add the estimate of estimate documentation files in this step. These files are to be added as confidential documents. Process for adding as a confidential document is described in Phase 3 of the workflow.

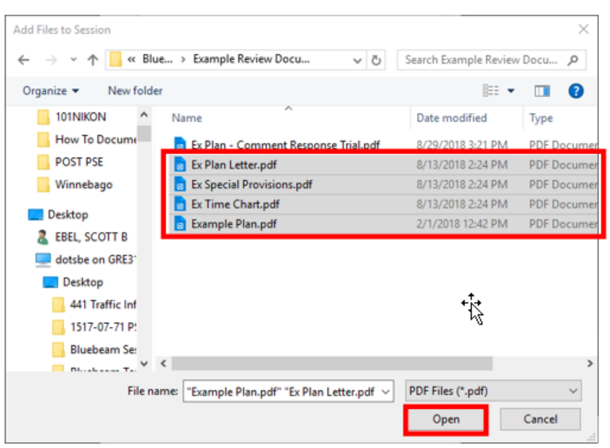

Figure 4: Adding files to the review session.

After all files have been selected, click “OK” to begin uploading them into the session (Figure 5).

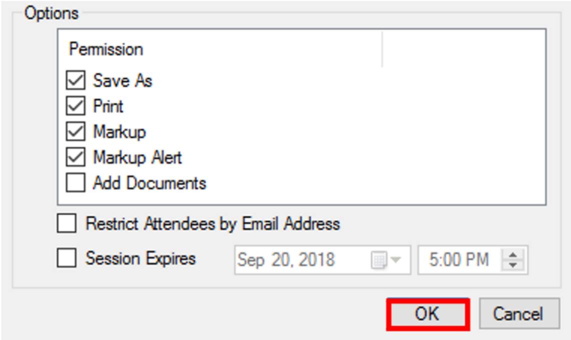

Figure 5: Start Studio Session Commencement.

After a few seconds, the “Session Invitation” window will appear (Figure 6).   Click “OK”.

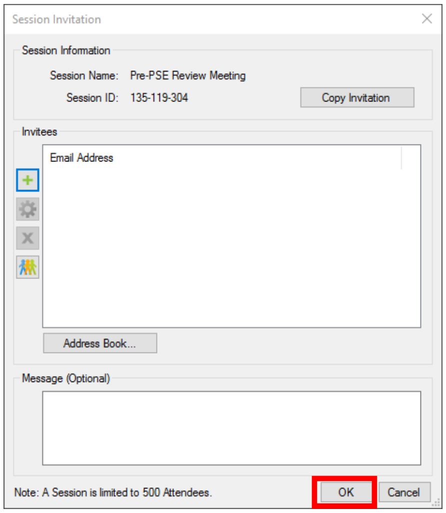

Figure 6: Session Invitation.

The review session is now live. This concludes Phase 2.

The session will be emailed to others for review using the process outlined in Phase 3.

Phase 3: Creating the notification email.

The steps that follow will walk you through the process of generating an email to be sent out to all the plan reviewers.

Note: A special Outlook Add-in called “Send ePlan Reviews” must be installed on your machine in order for this final phase to work. To install the add-in, click on the following link and follow the instructions. ePlan Review Workflow Installer *(link available to internal staff only)*

- Start the process by opening Outlook (if it’s not already running), select the “ePlan Review” tab, and click on “Send ePlan Review Invitations” as shown in Figure 7.

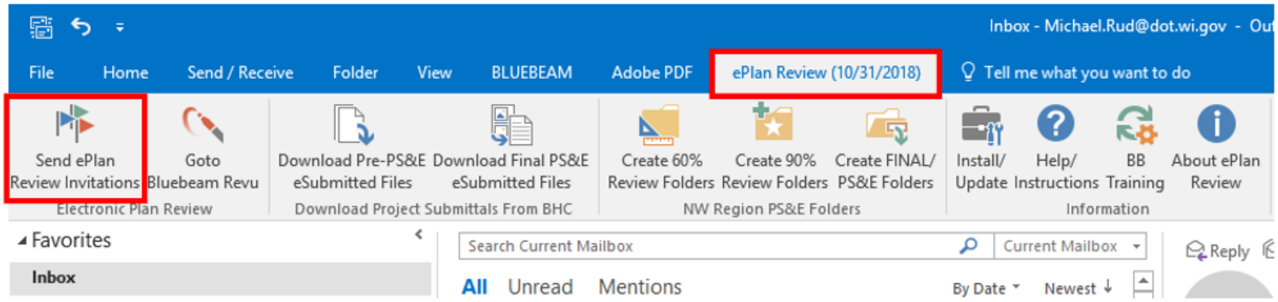

Figure 7: Generating ePlan review notification email.

Note: If the Add-in was previously installed, check for updates by selecting the "Install/Update" command under the "ePlan Review" tab. See Figure 8.

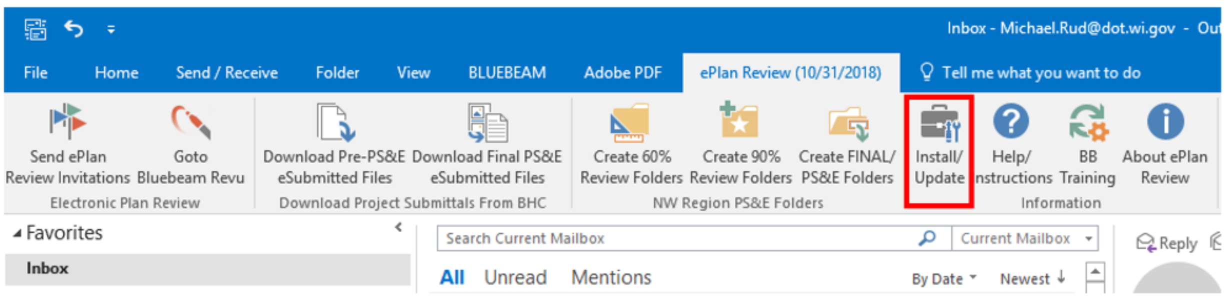

Figure 8: Check for Updates to Add-in.

- The "Starting ePlan Review App" dialogue box will open (Figure 9). Enter your MIIPS User ID and Password. Click "Ok".

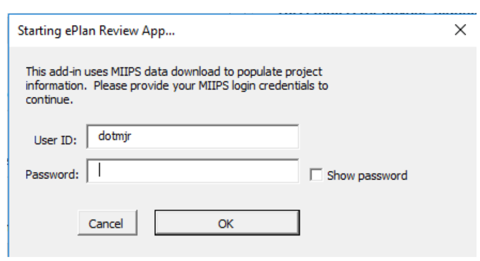

Figure 9: Starting ePlan Review App.

- Next, the application should start as seen below (Figure 10). The application includes a series of seven (7) tabs running across the top of the dialogue box.

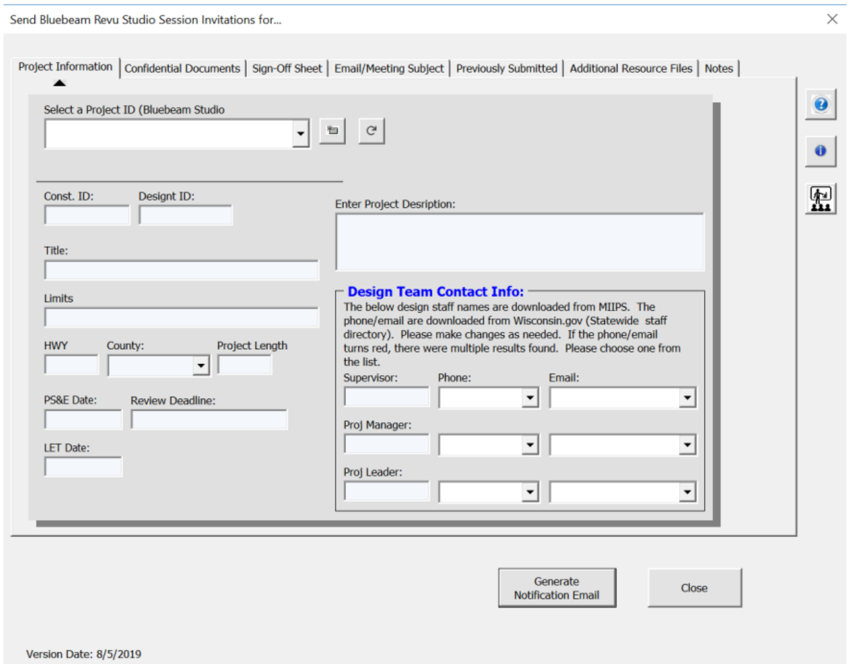

Figure 10: Send Bluebeam Revu Studio Session Invitation.

- Under the “Project Information” tab:
    1. Click on the browse button located to the right of the Project ID dropdown (see Figure 11). Once selected, a dialogue box titled “Create Bluebeam Revu Session Invitation” will appear (Figure 12).

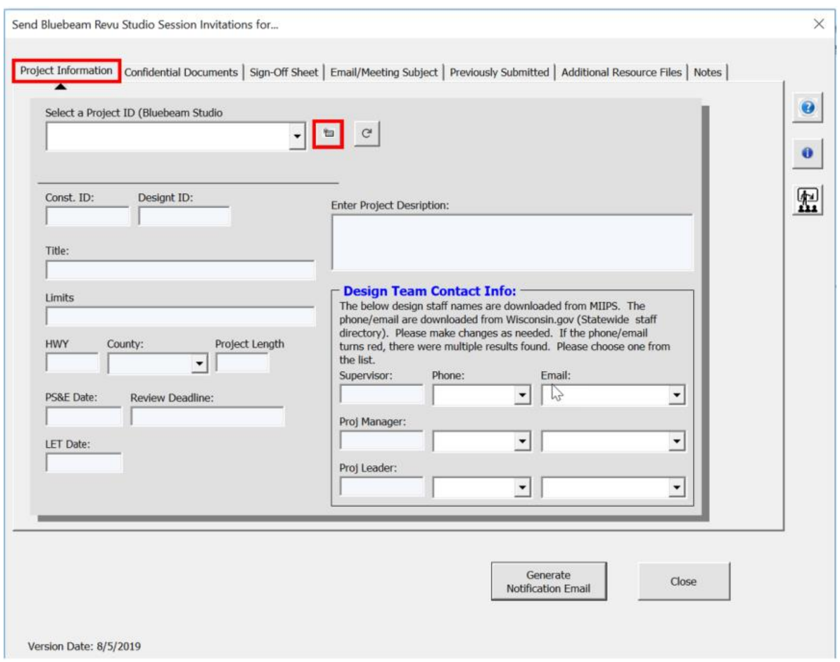

Figure 11: Send Bluebeam Revu Studio Session Invitation – “Project Information” tab.

2. Enter in the project’s construction ID (including hyphens) and session ID that was created in Bluebeam in Phase 2 of this process. Click “Ok”.

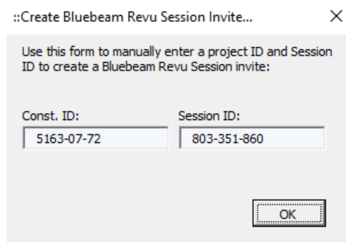

Figure 12: Create Bluebeam Revu Studio Session Invitation.

3. The project and design team contact information will be imported from MIIPS. (Figure 13)

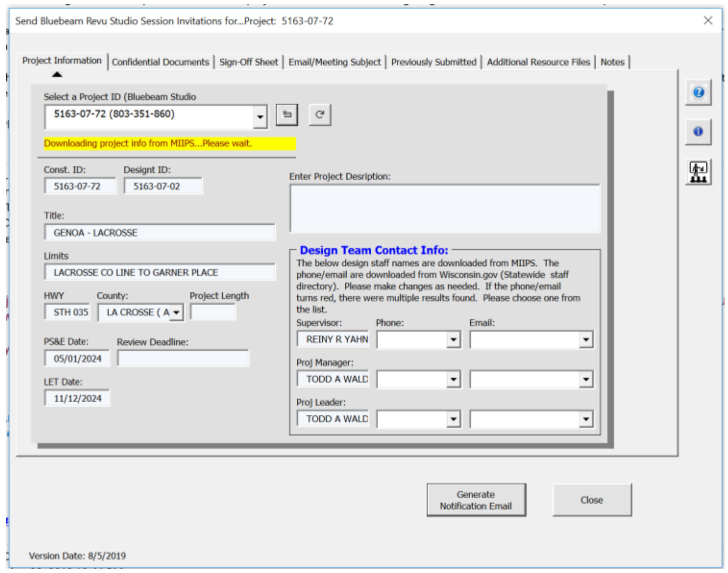

Figure 13: Downloading project and design team contact info from MIIPS.

- Under the "Confidential Documents" tab (Figure 14):
  1. Any files that should not be shared with external reviewers should be added here. Estimates and Estimate Documentation files would fall under this category.
  2. Add these files by selecting the browse tab and navigating to the location of the files.
     - If, after selecting the browse tab, the Windows Explorer dialogue box does appear, hold down the "Alt" key then hit the "Tab" key to bring up all open programs. Select the desired program or tab through the various opened windows and release the "Alt" key when you get to the desired window.
     - Reminder that you are selecting a folder here and not a specific file. So, don't be alarmed if the folder appears to be empty of files. Once the folder is selected the files contained within that folder will appear in the field below (see Figure 14).
  3. Select the desired files (see Figure 14).

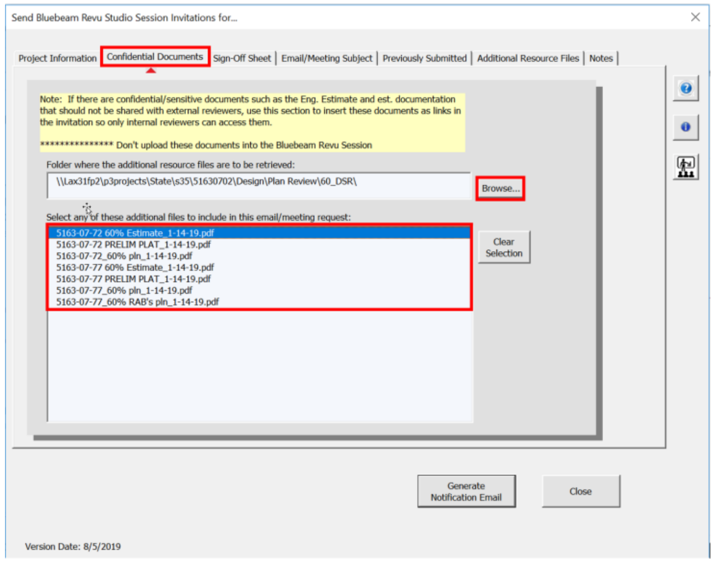

Figure 14: Send Bluebeam Revu Studio Session Invitation – "Confidential Documents" tab.

- Under the "Sign-Off Sheet" tab (Figure 15):
    1. Make sure that the "No sign-off sheet" option is checked. SW Region does not currently require the use of a reviewer sign-off sheet.

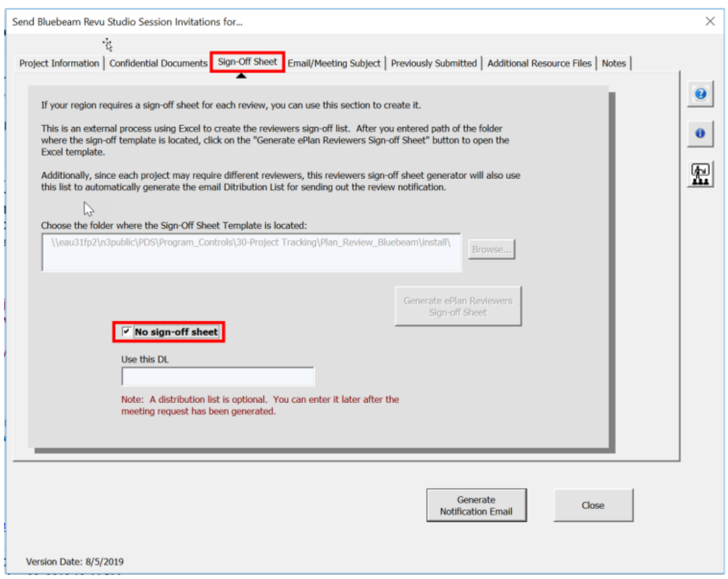

Figure 15: Send Bluebeam Revu Studio Session Invitation – "Sign-Off Sheet" tab.

- Under the "Email/Meeting Subject" tab (Figure 16):
    - Please select the correct project review from the "Meeting Request Subject" dropdown.

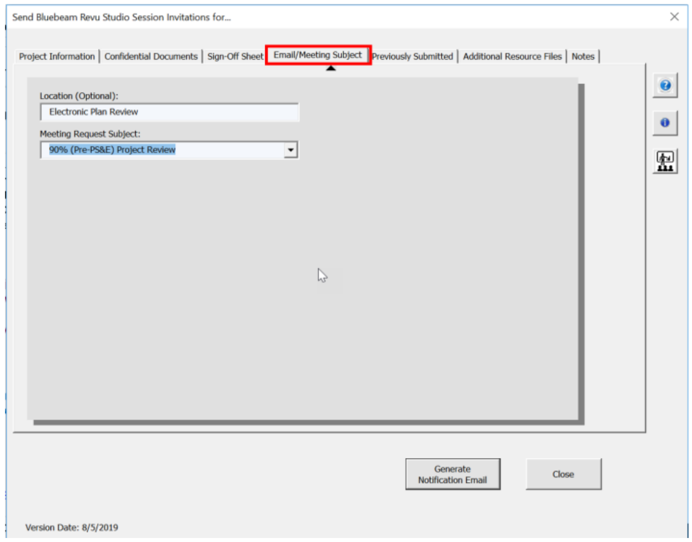

Figure 16: Send Bluebeam Revu Studio Session Invitation – "Email/Meeting Subject" tab.

- The "Previously Submitted" tab will not be used in most cases but is available if it fits your project. (Figure 17):

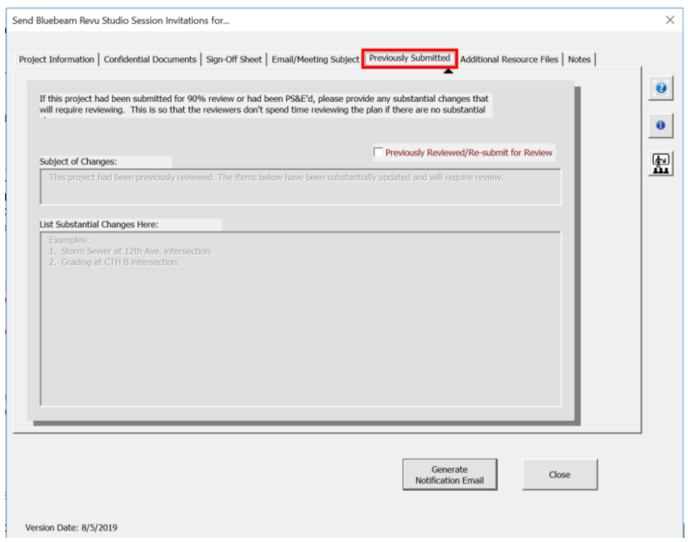

Figure 17: Send Bluebeam Revu Studio Session Invitation – "Previously Submitted" tab.

- Under the "Additional Resource Files" tab (Figure 18):
  1. Additional resource files can be added for guidance by selecting the browse tab and navigating to the location of the files.
     - It is recommended that these files include, at a minimum, the "SW Region eplan review instructions" and one of the following; "Final Scope Certification, Design Study, or Pre-PS&E Project Review Checklist," depending on which review you are currently requesting. All of these files are located at \\mad31zp1\projects\Support\Design\Project Review Process\ePlan Review Process *(link available to internal staff only).* In order for multiple additional resource files to be attached to the email, they need be located in the same folder.
     - Other files to consider adding to the additional resource files include the plan review files containing the comments and responses from the last review phase (i.e. Final Scope Certification Review files or Design Study Review files). These files will need to be added manually in the email template as they will be located in the project folder and not the destination shown in the link above.

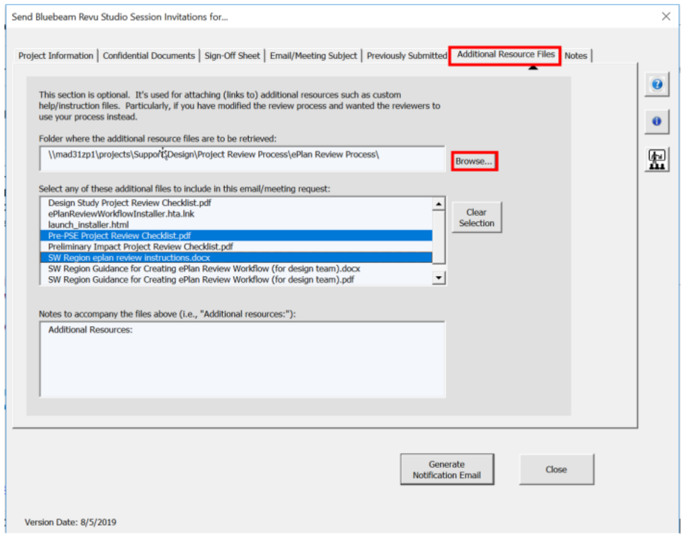

Figure 18: Send Bluebeam Revu Studio Session Invitation – "Additional Resource Files" tab.

- Under the "Notes" tab (Figure 19):
  1. This section provides information on the eplan review creation (much of what was discussed in the preceding steps).
  2. Lastly, click on the "Generate Notification Email" button. An email should be generated with a pre-fill message along with the link to the Bluebeam Session that was created in Phase 2.

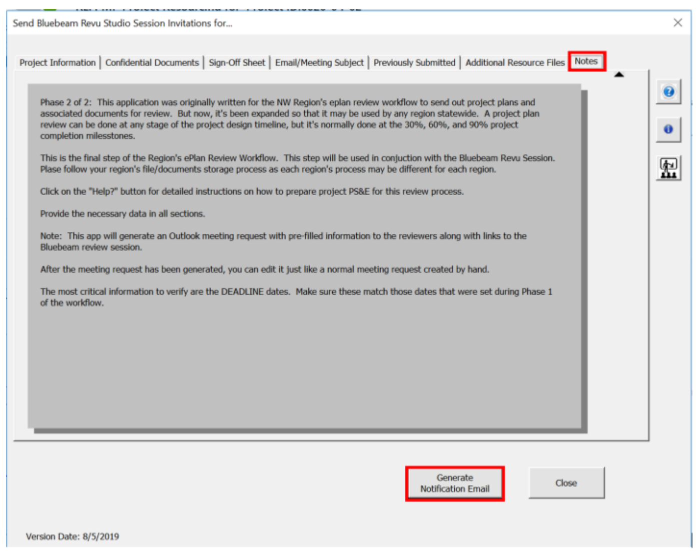

Figure 19: Send Bluebeam Revu Studio Session Invitation – "Notes" tab.

Note: This newly generated email is just like any new email that is created manually so it can be edited just as you would with an ordinary email.

- In this newly generated notification email (Figure 20a and 20b), you now will enter the appropriate review distribution list **(DOT DL DTSD SW LAX Plan Review and PSE Submittal** or **DOT DL DTSD SW MAD Plan Review and PSE Submittal)** along with any other individuals who should be included in the review process.
  - Note that PDS Project Managers are not included in these distribution lists and will need to be added individually.
  - Consultants can be added at this point as well and will be able to access the session as long as they have Bluebeam.

- Verify that the status and reminder settings are correct. The status should be set to "Busy" and reminder to "15 minutes". Also, check to make sure that the review deadline is correct before sending the email. Once you have selected the available conference room and necessary equipment and are satisfied that all the information included in the email is correct, hit the "Send" button to finish the eplan review workflow. Note that not all reviews may require a face-to-face meeting. In that event, the email can be sent out without reserving the room and equipment.

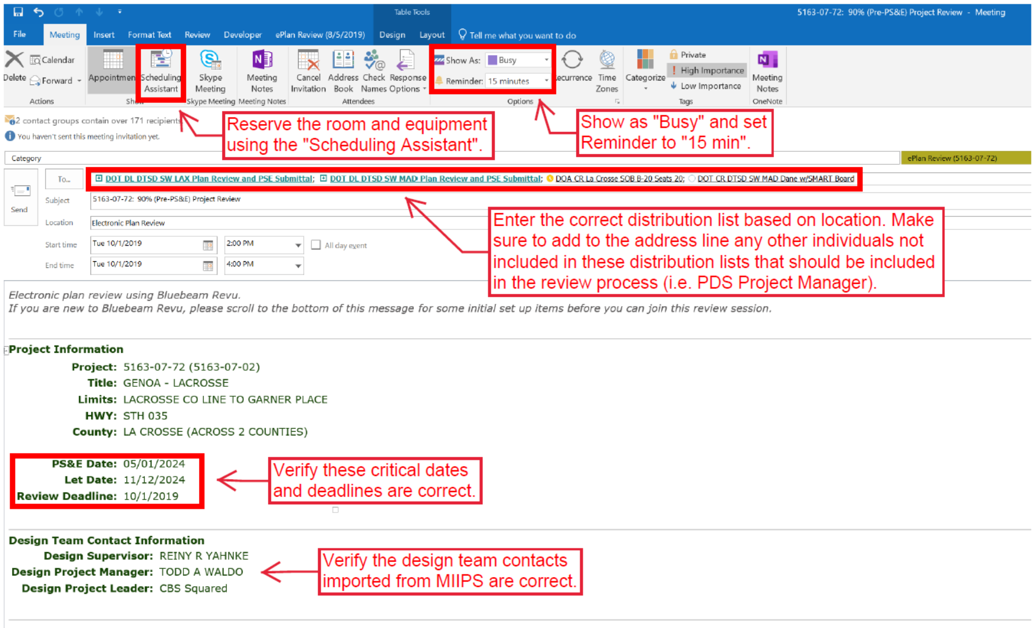

Figure 20a: Eplan review notification email (top half).

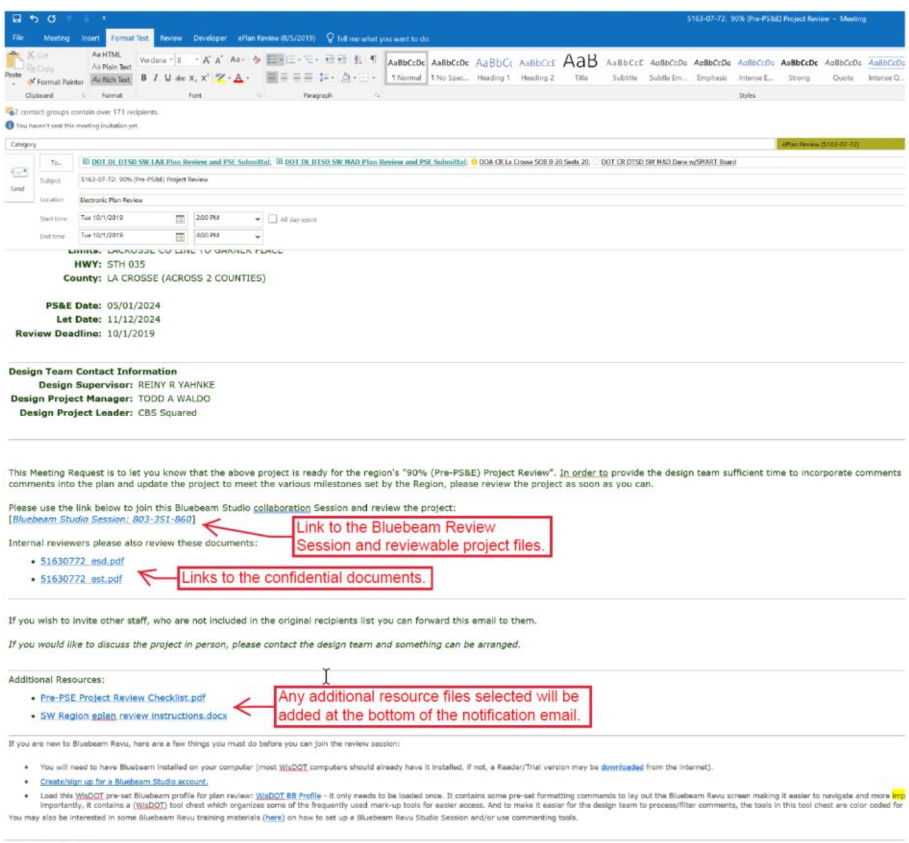

Figure 20b: Eplan review notification email (bottom half).

Phase 4: Compiling and Responding to Review Comments

****Reminder that the files are that included in a Bluebeam Studio Session are uploaded to "the cloud" and not on the DOT network. Therefore, they will need to be saved back into the project folder on the network prior to sending out to the reviewers.*

Note: Anyone can respond to comments in Bluebeam. It doesn't necessarily have to be the creator of the Studio Session.

Once all the review comments have been received and the review meeting is held, the design team will need to address each of the comments individually. It is required that the design team provide each of the reviewer's acknowledgement of their comments; whether that be they agree with the comment and will incorporate it into the plan, estimate, or PS&E document or disagree and choose to leave the comment out.

There are a few different ways the design team can export the review comments for documentation purposes and present the information to the reviewer. The options are described in the training videos and documentation linked below.

- See the How to Organize and Respond to Comments training video, How to Save a Record of Session Comments training video, How to Export Comments to an XML Format training video, or How to Reply to Comments documentation for guidance on addressing review comments.
- Once all comments are addressed, a copy should be saved in the project folder under the "Plan Review" subfolder. A link to either that file or a comments summary file, that was created using the process described in one of the above video links, should be emailed to the reviewers to let them know whether their comments were incorporated or not and, if not, why.

Phase 5: Finalizing the review session.

Once the review deadline has passed, the meeting has been held, and comments addressed, the review session should be finalized.

- See the instructions for Finishing and Removing Sessions in Bluebeam provided on the Bluebeam SharePoint site.